New Sub-Account Creation Process

This setup guide was created keeping in mind the standard approaches that we've seen overlap with our top clients. Please keep in mind that all of this is up for change based on the client.

<u>When in doubt, map it out.</u>

If you go in the order of this document, you will have the fewest amount of interruptions (if any).

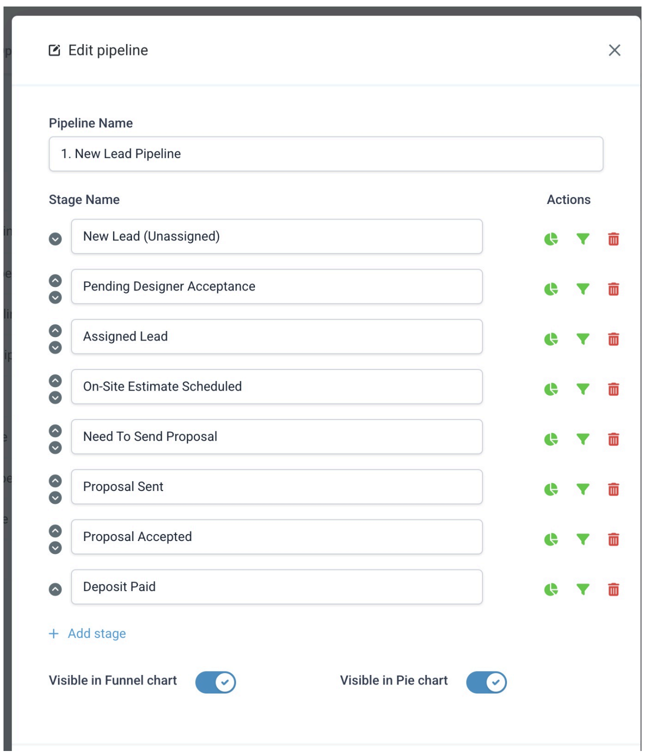
- [ ] **<u>Integrations</u>**
    - [ ] Google business profile
    - [ ] Facebook ads
    - [ ] Google ads
    - [ ] Quickbooks
    - [ ] Payment Process
    - [ ] 3rd party apps
- [ ] **<u>Website</u>**
    - [ ] Landing page
    - [ ] Standard terms and conditions
    - [ ] Standard privacy policy
    - [ ] Domain (link: How to use the Domain Connect feature? : HighLevel Support Portal)
- [ ] **<u>Phone system</u>**
    - [ ] A2P registration (link: A2P 10DLC Brand Approval Best Practices : HighLevel Support Portal)
        - [ ] Need EIN

- [ ] Need support email

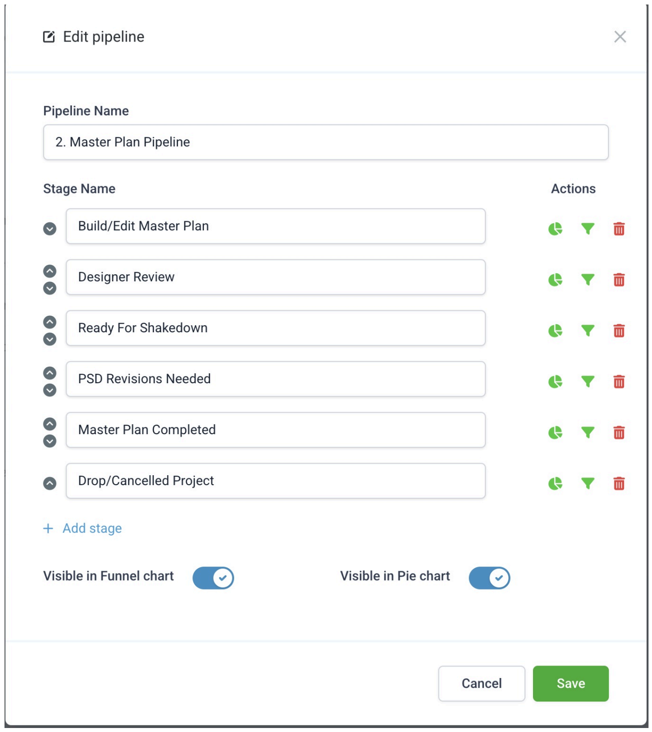
- [ ] **Pipelines**

- [ ] **PRESENT EXACT PIPELINES AND SEE WHAT DIFFERENCES THE CLIENT LIKES**

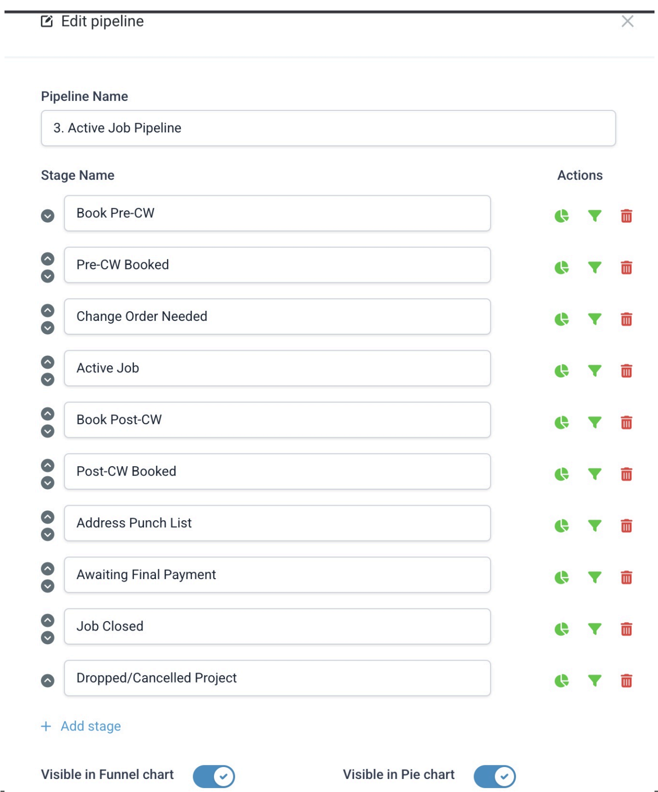
Make sure that you include all of the numbers to ensure that everyone understands the chronological order of operations.



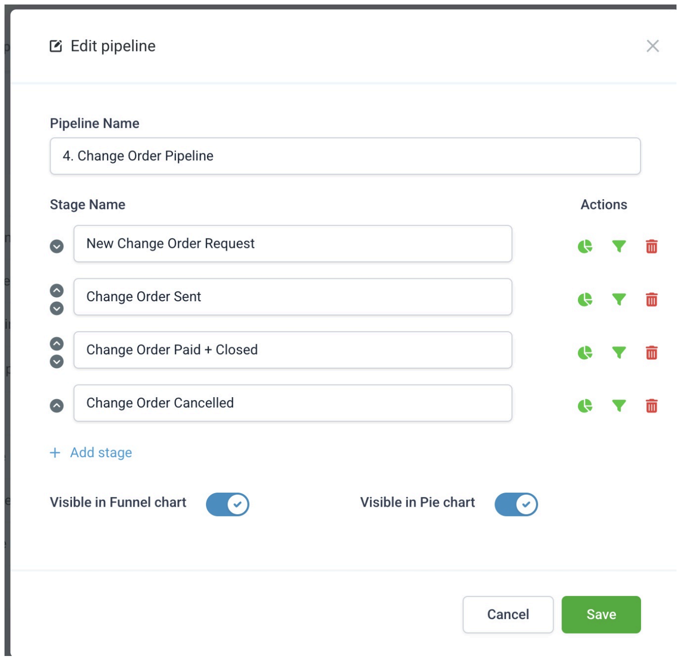
- [ ]

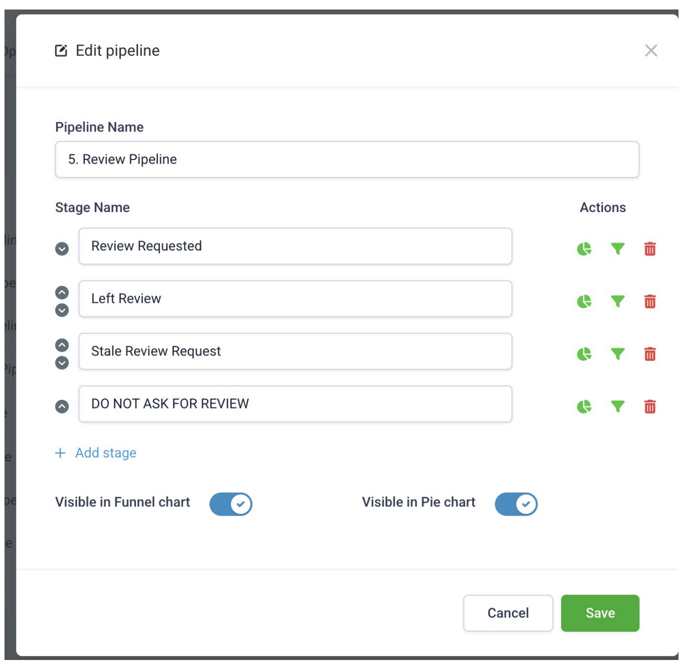

Edit pipeline
Pipeline Name
2. Master Plan Pipeline
Stage Name
Actions
Build/Edit Master Plan
Designer Review
Ready For Shakedown
PSD Revisions Needed
Master Plan Completed
Drop/Cancelled Project
+ Add stage
Visible in Funnel chart
Visible in Pie chart
Cancel
Save

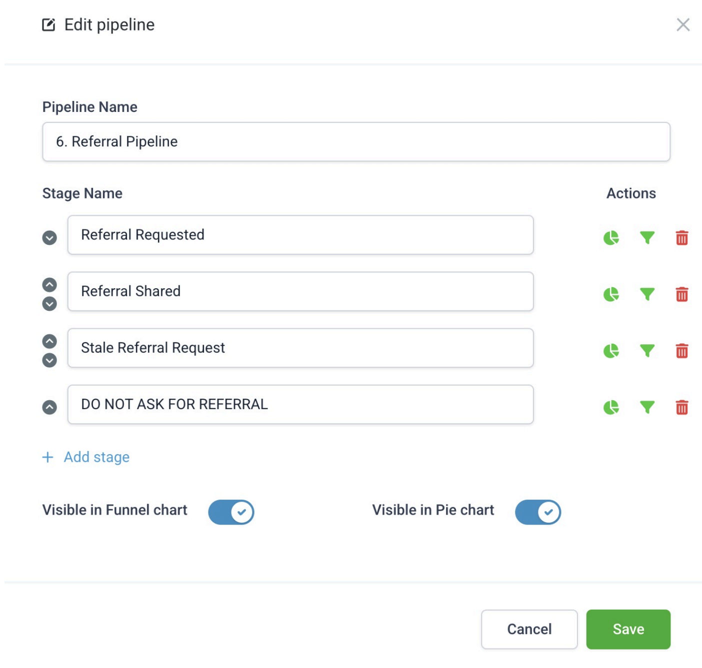
- [ ]


Edit pipeline
Pipeline Name
3. Active Job Pipeline
Stage Name
Actions
Book Pre-CW
Pre-CW Booked
Change Order Needed
Active Job
Book Post-CW
Post-CW Booked
Address Punch List
Awaiting Final Payment
Job Closed
Dropped/Cancelled Project
+ Add stage
Visible in Funnel chart
Visible in Pie chart

- [x]


Edit pipeline
Pipeline Name
4. Change Order Pipeline
Stage Name
Actions
New Change Order Request
Change Order Sent
Change Order Paid + Closed
Change Order Cancelled
+ Add stage
Visible in Funnel chart
Visible in Pie chart
Cancel
Save


Edit pipeline
Pipeline Name
5. Review Pipeline
Stage Name
Actions
Review Requested
Left Review
Stale Review Request
DO NOT ASK FOR REVIEW
+ Add stage
Visible in Funnel chart
Visible in Pie chart
Cancel
Save



- [ ]

- [ ] **Custom field folders**

- [ ] New Project Questionnaire (Intake)
- [ ] Qualification Questionnaire
- [ ] On-Site Consultation Questionnaire
- [ ] Design Questionnaire
- [ ] Pre-CW Questionnaire
- [ ] Post-CW Questionnaire

- [ ] **Custom value folders**

- [ ] Calendar Links
- [ ] Form/Survey Links

- [ ] **Forms/Surveys**

- [ ] Calendar forms
- [ ] **Qualification forms**
    - [ ] **this is based on the client’s qualification process**

☐ On-Site Consultation

1st Appointment Form

Were you able to complete the 1st appointment for the on-site estimate? *

Do the on-site conditions match the information provided in the lead's questionnaire? *

Include any scope differences/details you want to include. *

Is access to the future job site restricted? *

Note any challenges with material delivery or equipment access. *

Will they consider financing options? *

- ☐ Yes
- ☐ No

Site Pictures Upload

Upload a file

Please note any additional details captured such as material requests, budget concerns, timing concerns, HOA concerns, etc. *

- [ ] Shakedown/Project Prep Meeting

Shakedown

Do the Master Plan(s) need to be revised by Draftsman?

Revison(s) needed notes, please be specific.

If not applicable, just put n/a.

Assigned Project MGMT staff

Client Stakeholders

List all required POC's for project - Name only if phone # is in JobTread

Vendor/Supplier Stakeholder

Materials/Tradtional or Specialty Equipment needing to be purchased to fulfill the project scope. *List 3-5 main suppliers that required 2-3 weeks in advance to order material) N/A

SUBCONTRACTOR/CREW STAKEHOLDERS

List all subs who are required to fulfill their SOW and provide them with complete plans and must have a budget in place – goal is to have 2-4 subs in each specialty trade to allow

SOLD GROSS PROFIT MARGIN % & ESTIMATED NET

37% GPM (10% Net) should be minimum unless approved by SM or Owner

SERVICE BUDGETS & RISK

Sub scopes with budget, assigned crew scopes and budgets. Fixed costs or estimated days/hour wages. (Will be set on form and tracked in JobTread) - Forecast any service

MATERIAL/EQUIPMENT BUDGETS & RISK

Bidded material budget can be provided through JobTread - we are to discuss any possible material/equipment that may have not been bidded and docuement here along

CONTINGENCY BUDGET & RISK

Ellaborate on contingency provided in bid and what is referred towards. If no contingency is bidded, forecast any potencials contingencys that may arise and put a cost towards it.

Additional Budget notes

If not applicable input N/A

☐ Pre-Construction Walkthrough

Pre-CW Form

Were you able to conduct the pre-construction walkthrough? *

Does the site look like what the plan shows? *

Describe things that dont match or need revision. Be specific please *

Are all work areas clear and big enough for our heavy equipment? *

Describe Access restrictions and solutions *

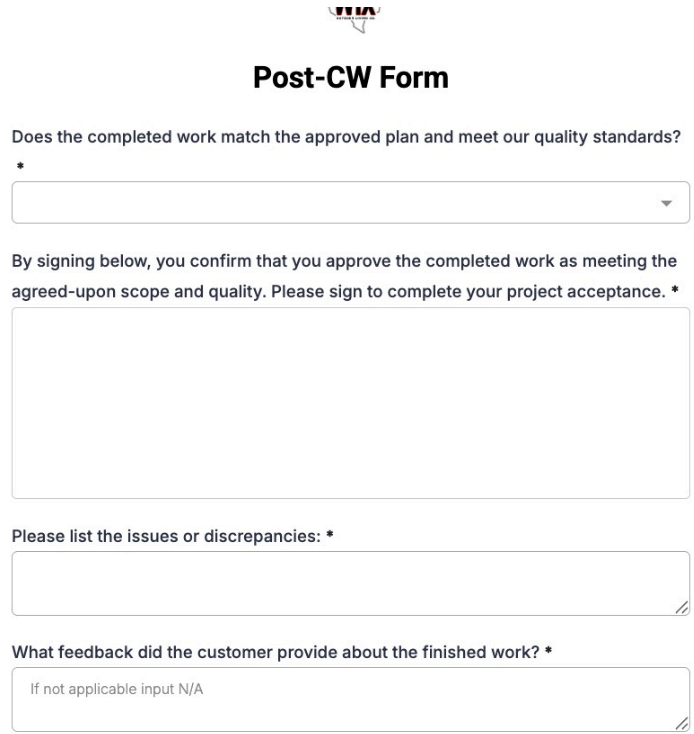
Did you have to change any measurements or parts of the plan after checking the site? *

Describe Measurements needing update *

By signing below, you confirm that you have reviewed the project details and that the site conditions meet your expectations. Your signature indicates your approval to move forward with construction as planned. *

Include any additional details about the pre-cw walkthrough here. *

- [ ] Post-Construction Walkthrough



Post-CW Form

Does the completed work match the approved plan and meet our quality standards? *

By signing below, you confirm that you approve the completed work as meeting the agreed-upon scope and quality. Please sign to complete your project acceptance. *

Please list the issues or discrepancies: *

What feedback did the customer provide about the finished work? *

If not applicable input N/A

- [ ] Project Photoshoot Checklist

☐ Custom values + Trigger Links

- [ ] Save surveys as custom values
- [ ] Save custom values as trigger links with UTM parameters

?contact_id={{contact.id}}

Example would be: {{ custom_values.landscaping_job_outcome_survey }}?contact_id={{contact.id}}

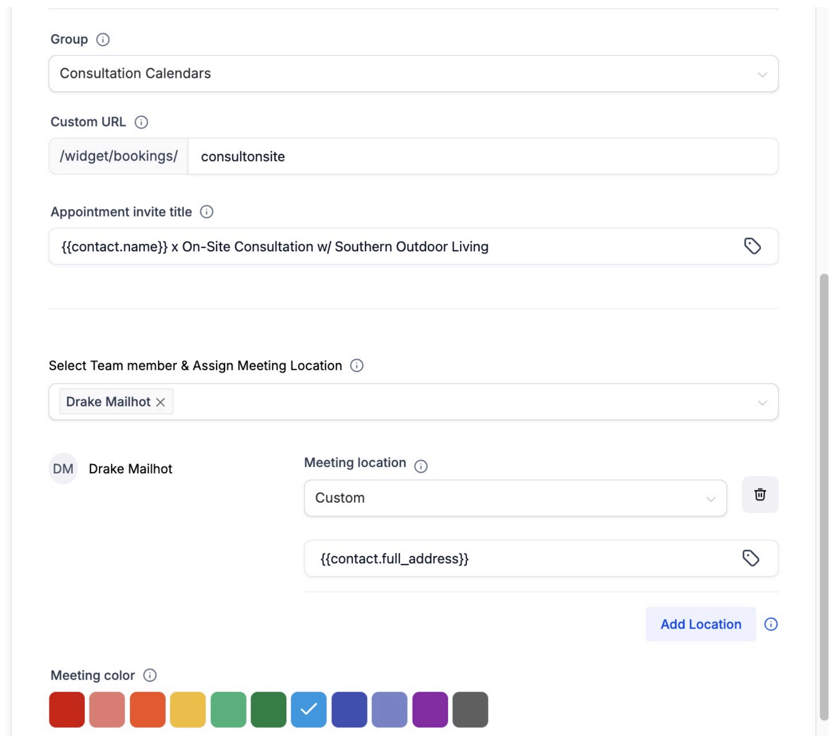
☐ Add Users

- [ ] Add owner
- [ ] Add all users to sub-account ***before*** creating calendars
  - [x] ~~**COLLECT ALL CONTACTS + PHONE + EMAIL**~~

☐ Calendars

I set these up as service calendars. First start with creating your calendar groups. Then add your calendars. Make sure each calendar has a different color to allow for visual recognition.

- ☐ Calendar Groups
  - ☐ Consultation Calendar Group
  - ☐ Construction Calendars Group
- ☐ Calendars
  - ☐ On-Site Consultation Calendar (Light Blue)



  - ☐ On-Site Project Presentation (Dark Green)
  - ☐ Pre-Construction Walkthrough (Dark Red)
  - ☐ Post-Construction Walkthrough (Purple)
  - ☐ Project Photoshoot (Dark Blue)

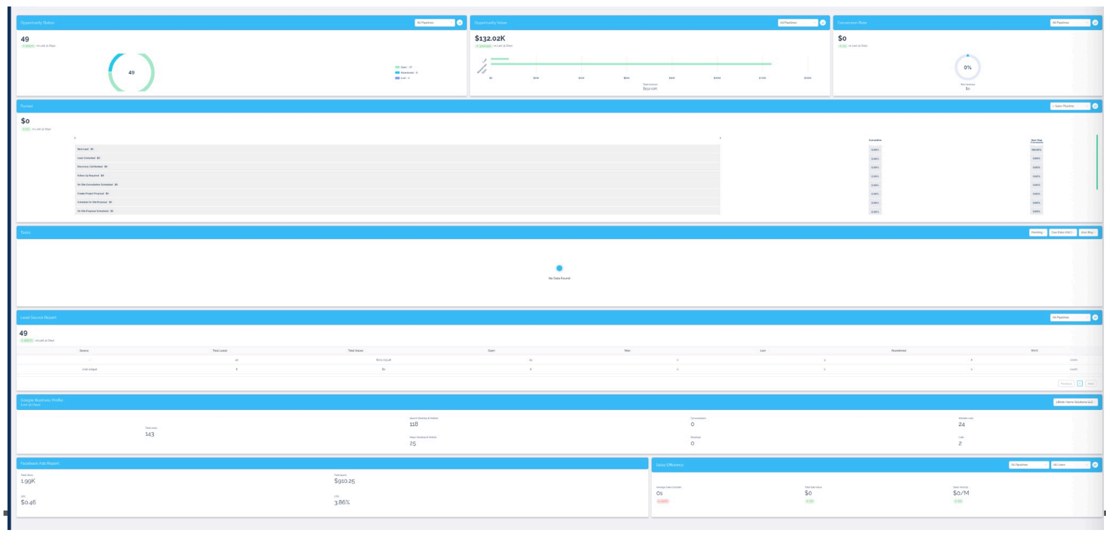
☐ Estimate & Invoice Settings

  - ☐ Setup Stripe account if needed
  - ☐ Connect payment processor
  - ☐ Turn auto invoice on here

☐ Automations + Tag setup

- [ ] Sales
- [ ] Job management
- [ ] Project stacking
- [ ] Review management
    - [ ] [Schedule your Review Post in Social Planner]

☐ Dashboards

- [x] 

- [ ] Sales Dashboard
    - [ ] Top Row = Opportunity Status, Value, Conversion Rate
    - [ ] Second Row = Sales Funnel
    - [ ] Third Row = Lead Source Report
    - [ ] Fourth Row = GBP
    - [ ] Fifth Row = Facebook + PPC reporting
    - [ ] Sixth Row = Sales Efficiency
- [ ] [How to Edit a dashboard : HighLevel Support Portal]
- [ ] [Edit widgets on the dashboard : HighLevel Support Portal]

☐ Custom Reports

- [ ] [How to create and schedule reports : HighLevel Support Portal]

- [ ] **Domain Setup**
  - [ ] Connect existing domain: How to use the Domain Connect feature? : HighLevel Support Portal
  - [ ] Buy new domain: How to Purchase Domain Step by Step : HighLevel Support Portal
- [ ] **Email system**
  - [ ] G Suite Setup
  - [ ] Dedicated sub domain setup (link: How to Set Up a Dedicated Sending Domain (LC Email) : HighLevel Support Portal)